



Te Pūkenga

Level 2, Wintec House
Cnr Anglesea and Nisbet St.
Hamilton 3204

0800 86 22 84
info@tepūkenga.ac.nz
tepūkenga.ac.nz

16 September 2024



Tēnā koe

Request under the Official Information Act 1982 – Competitive market analysis

Thank you for your email of 26 August 2024, requesting the following information from Te Pūkenga – New Zealand Institute of Skills and Technology (Te Pūkenga):

This question relates to competitive market analysis undertaken by TEC to assess current educational provider competition in the jurisdiction of each Te Pūkenga subsidiary.

Please provide:

- 1. A copy of the slide pack prepared by Te Pūkenga to detail ‘competitive analysis’ across each Te Pūkenga subsidiary*
- 2. A copy of any corresponding reports detailing findings of Te Pūkenga’s [sic] competitive market analysis*
- 3. A copy of any correspondence to TEC and/or the Minister of Tertiary Education or her officials in respect to the topic of competitive market analysis*

This letter provides a formal decision on your request under the Official Information Act 1982 (OIA).

The decision

Question One

Please find attached as **Appendix One** a copy of Te Pūkenga “*DRAFT 2024 Regional Competition Analysis April 2024*”. Please note, while it is titled as a draft document, there was no resulting final version.

Question Two

We are not aware of any *corresponding reports detailing findings of Te Pūkenga competitive market analysis*, and therefore must refuse this part of your request under section 18(e) of the OIA as:

- *the document alleged to contain the information requested does not exist or, despite reasonable efforts to locate it, cannot be found.*

Question Three

In order to locate any correspondence within scope of your request, from Te Pūkenga to *TEC and/or the Minister of Tertiary Education or her officials*, we searched sent emails from myself, as Chief Executive, our former Chief Financial Officer and current Interim Chief Financial Officer, for any items sent to either the Tertiary Education Commission, Minister Simmonds or her office that included keywords "*competitive market analysis*".

We can confirm that there were no such emails found. Therefore, we must also refuse this part of your request under section 18(e) of the OIA.

You have the right to make a complaint to the Ombudsman under section 28(3) of the OIA if you are not happy with this response. Information about how to do this is available at www.ombudsman.parliament.nz or by calling 0800 802 602.

We may publish our OIA responses and the information contained in our reply to you on our website. Before publishing we will remove any personal or identifiable information.

Ngā mihi

A handwritten signature in black ink, appearing to read 'Gus Gilmore', with a large circular flourish above the name.

Gus Gilmore
Tumuaki | Chief Executive

RELEASED UNDER THE
OFFICIAL INFORMATION ACT 1982

DRAFT 2024 Regional Competition Analysis April 2024

Te rārangi kaupapa | Agenda



1

Overview

2

Summary

3

Regional Summaries

RELEASED UNDER THE
OFFICIAL INFORMATION ACT 1982

Overview

Overview

Following cost-to-serve analyses for all ITPs, investigation into the competitive environments for tertiary education organisations (TEOs) across New Zealand’s regions was deemed necessary.

2023 EFTS volume data, sourced from TEC Nga Kete, was used to assess TEO competition within New Zealand’s 16 regions. A 17th region, denoted “Rest of New Zealand” encapsulates learners who do not belong to a set New Zealand region.

The following slides, investigate the relative market share each TEO has within a region – with a large focus on the balance of universities and institutes of technology and polytechnics (ITPs). Further analysis undertaken on summary slides, split regions into either a University Centre or an ITP Centre to determine which ITPs currently underperform given their relative competitive environment. A quick snapshot of the largest TEO, by region, has been provided in the table to the right.

Although not present within these slides, further analysis can be undertaken, splitting EFTS volumes by priority learner and qualification level type.

Regions	Largest TEO (2023 EFTS)
Auckland	University of Auckland (34,945)
Bay of Plenty	Toi Ohomai (3,388)
Canterbury	University of Canterbury (16,963)
Rest of New Zealand	AUT (1,519)
Gisborne	EIT (921)
Hawkes Bay	EIT (2,484)
Manawatu - Whanganui	Massey University (4,176)
Marlborough	NMIT (306)
Nelson	NMIT (1,552)
Northland	Northtec (1,424)
Otago	University of Otago (16,728)
Southland	SIT (1,860)
Taranaki	WITT (1,368)
Tasman	Competenz/Open Polytech (88 each)
Waikato	University of Waikato (8,112)
Wellington	Victoria University of Wellington (15,086)
West Coast	Westport Deep Sea Fishing (192)

Legend: ITP Centres

University Centres

RELEASED UNDER THE
OFFICIAL INFORMATION ACT 1982

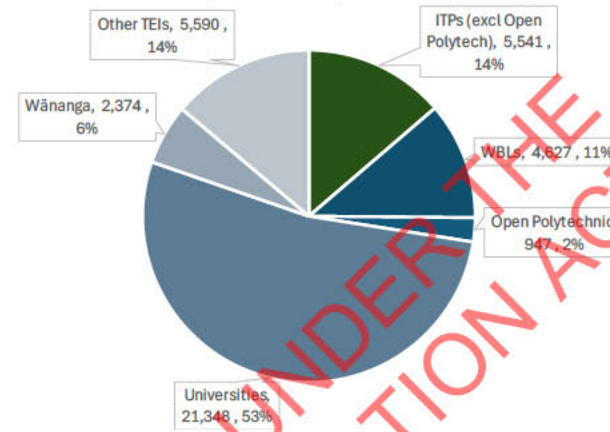
Summary

Key Observations

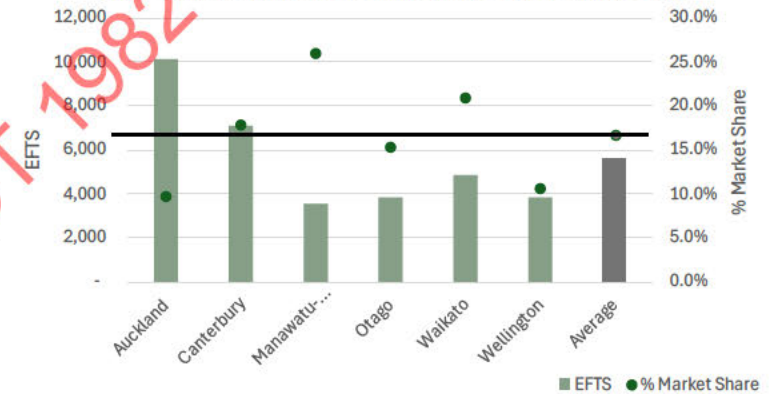
University Centres

- Considering University centres (regions where a main university campus is present), the average market share for a university is 53% in these regions, while ITP's (excluding Open Polytech) market share is 14% on average.
- By this metric, Canterbury, Manawatu-Whanganui, and Waikato perform greater than the average, while Auckland, Otago, and Wellington are underperforming regions.

2023 Average University Centre by TEI Type



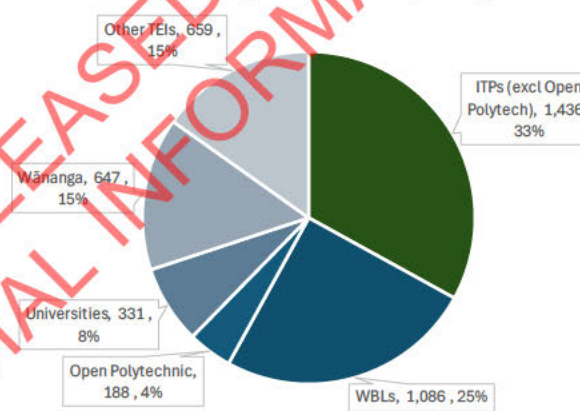
ITP Market Share in a University Centre (excl OP)



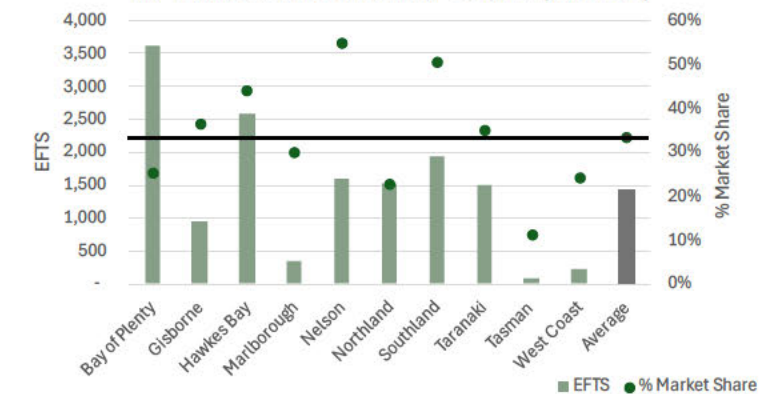
ITP Centres

- Considering ITP centres (regions where a main ITP campus is present, and no main university campus is present), the average market share for an ITP is 33% in these regions, while Universities market share is 8% on average.
- By this metric, Gisborne, Hawke's Bay, Nelson, Southland, and Taranaki perform greater than the average, while Bay of Plenty, Marlborough, Northland, Tasman and the West Coast are underperforming regions.

2023 Average ITP Centre by TEI Type



ITP Market Share in an ITP Centre (excl OP)



RELEASED UNDER THE
OFFICIAL INFORMATION ACT 1982

Regional Summaries

Northland Region

The Northland Region is New Zealand's 8th largest market for learners. 66 different TEO's compete within the region. The Northland region is New Zealand's 8th largest region by population.

ITPs

- NorthTec is the primary ITP provider within the Northland region, with a main campus located in Whangarei. Additionally, Open Polytechnic, SIT, Otago Polytechnic, NMIT, Toi Ohomai, Unitec, WelTec & Whitireia, Ara, and Wintec also have learners within the region. Excluding Open Polytechnic, this accounts for 23% of the Northland learner's market.
- NorthTec accounts for 21% (1,424) of the Northland learner's market.

Universities

- Universities take up a relatively small proportion of the local learner's market, comparatively to other regions; only 5%. Massey remains the largest entity operating in Northland accounting for 4% of the Northland learner's market, with Waikato, Auckland, Otago, Lincoln, and Canterbury making up the remaining 1%.

Wānanga

- Te Wānanga o Aotearoa (TWOA) and Te Whare Wānanga o Awanuiārangi (TWWoA) account for 16% of the Northland learner's market.

Number of Learners (2023)

6,729

Regional Population (2023)

203,900

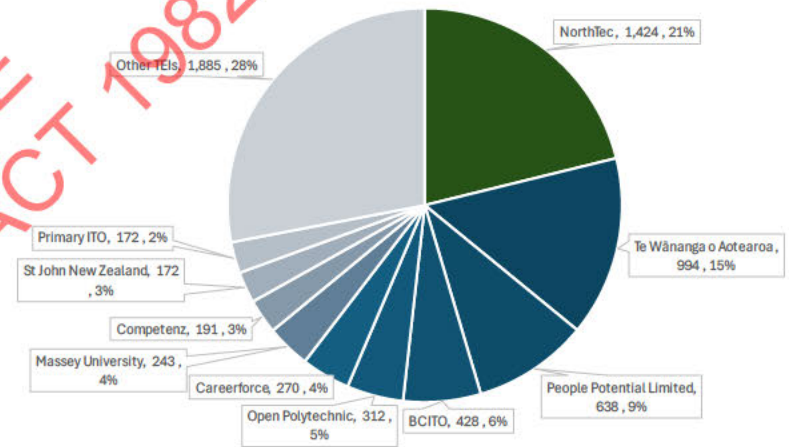
% of National Learners (2023)

2.3%

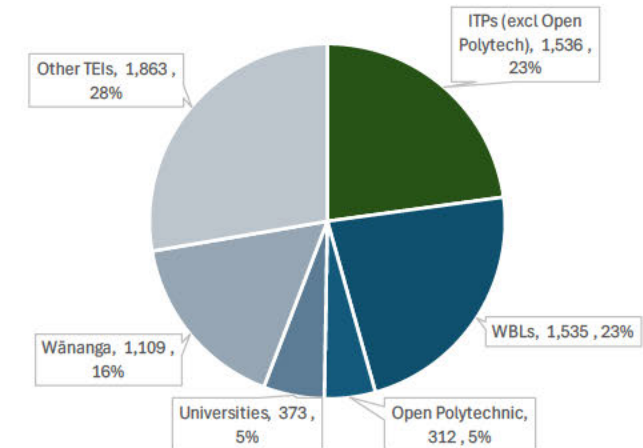
Learner % of Regional Pop.

3.3%

2023 Northland Competitive Market



2023 Northland Market by TEI Type



Auckland Region

The Auckland Region is New Zealand's largest market for learners. 132 different TEO's compete within the region. The Auckland Region is New Zealand's largest region by population.

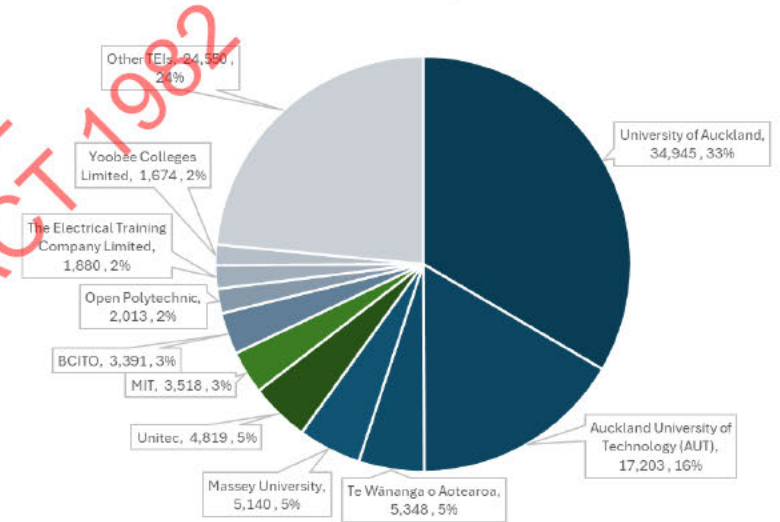
ITPs

- Both Unitec and MIT have their main campuses located within the Auckland region. Additionally, Open Polytechnic, Otago Polytechnic, SIT, EIT, Northtec, Toi Ohomai, NMIT, Ara, UCOL, Wintec, WelTec & Whitireia, and Tai Poutini also have learners within the region. Excluding Open Polytechnic, this accounts for 10% of the Auckland learner's market.
- Unitec and MIT accounts for 8% (8,337) of the Auckland learner's market.

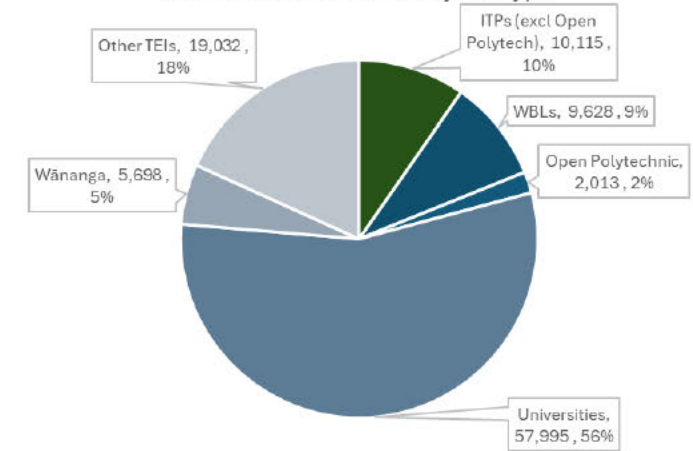
Universities

- The Auckland Market is dominated by the University of Auckland, Auckland University of Technology (AUT) and Massey University; accounting for 55% of the Auckland learner market. Other universities such as Otago, Waikato, Victoria, Lincoln, and Canterbury account for 1% of the Auckland learner market.

2023 Auckland Competitive Market



2023 Auckland Market by TEI Type



Number of Learners (2023)

104,482

Regional Population (2023)

1,739,300

% of National Learners (2023)

36.1%

Learner % of Regional Pop.

6.0%

Waikato Region

The Waikato Region is New Zealand's 5th largest market for learners. 88 different TEO's compete within the region. The Waikato region is New Zealand's 4th largest region by population.

ITPs

- Wintec is the primary ITP provider within the Waikato region, with a main campus located in Hamilton. Additionally, Open Polytechnic, Toi Ohomai, Otago Polytechnic, SIT, NorthTec, Toi Ohomai, WelTec & Whitireia, UCOL, NMIT, Ara and MIT also have learners within the region. Excluding Open Polytechnic, this accounts for 21% of the Waikato learner's market.
- Wintec accounts for 18% (4,183) of the Waikato learner's market.

Universities

- Universities take up a relatively large proportion of the local learner's market, comparatively to other regions; at 38%. Waikato University is the largest entity operating in Waikato region accounting for 35% of the Waikato learner's market, with Massey, Otago, Victoria, Lincoln, and Canterbury making up the remaining 3%.

Wānanga

- TWOA and TWWoA account for 8% of the Waikato learner's market.

Number of Learners (2023)

23,093

Regional Population (2023)

522,600

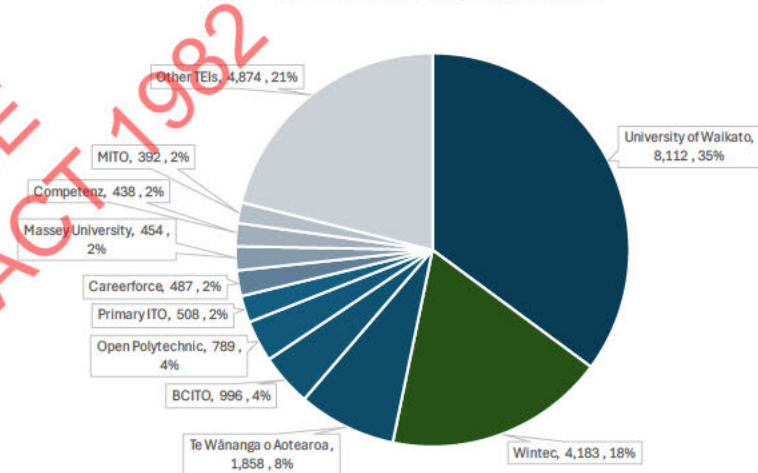
% of National Learners (2023)

8.0%

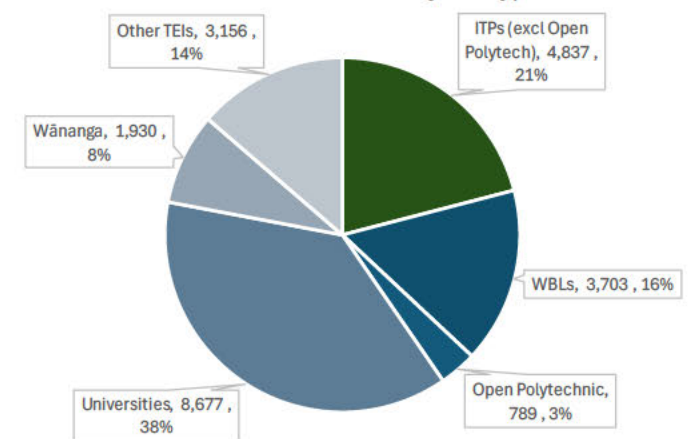
Learner % of Regional Pop.

4.4%

2023 Waikato Competitive Market



2023 Waikato Market by TEI Type



Bay of Plenty Region

The Bay of Plenty Region (BOP) is New Zealand's sixth largest market for learners. 73 different TEO's compete within the region. The BOP region is New Zealand's 5th largest region by population.

ITPs

- Toi Ohomai is the primary ITP provider within the BOP region, with a main campus located in Tauranga. Additionally, Open Polytechnic, SIT, Otago Polytechnic, Unitec, WelTec & Whitireia, Wintec, NMIT and MIT also have learners within the region. Excluding Open Polytechnic, this accounts for 25% of the BOP learner's market.
- Toi Ohomai accounts for 23% (3,388) of the BOP learner's market.

Universities

- The BOP's University Market is largely occupied by Waikato and Massey University, collectively accounting for 10% of the BOP learner market. Smaller players such as Otago, Victoria, Lincoln, and Canterbury account for the remaining 1% of University learners.

Wānanga

- TWoA and TWWoA account for 25% of the BOP learner's market.

Number of Learners (2023)

14,431

Regional Population (2023)

354,100

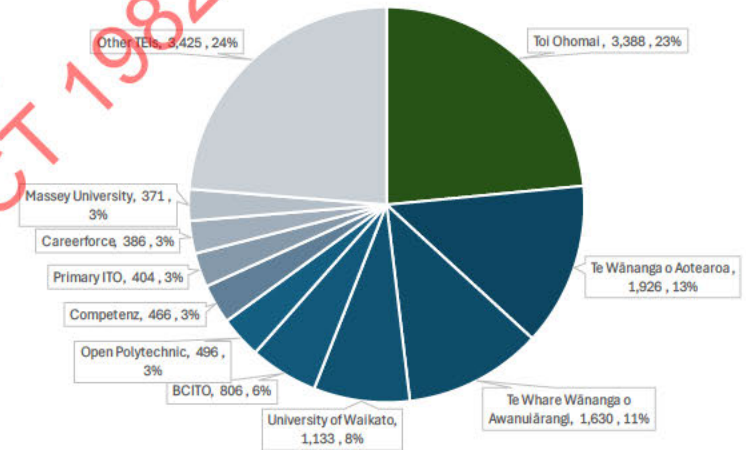
% of National Learners (2023)

5.0%

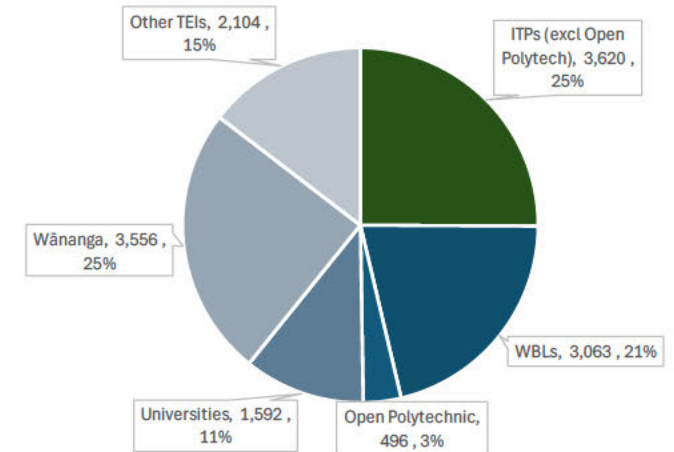
Learner % of Regional Pop.

4.1%

2023 BOP Competitive Market



2023 BOP Market by TEI Type



Gisborne Region

The Gisborne Region is New Zealand's 14th largest market for learners. 37 different TEO's compete within the region. The Gisborne region is New Zealand's 14th largest region by population.

ITPs

- EIT is the primary ITP provider within the Gisborne region, with a main campus located in Gisborne. Additionally, Open Polytechnic, SIT, Otago Polytechnic, and Toi Ohomai also have learners within the region. Excluding Open Polytechnic, this accounts for 36% of the Gisborne learner's market.
- EIT accounts for 36% (921) of the Gisborne learner's market.

Universities

- Universities take up a relatively small proportion of the local learner's market, comparatively to other regions; only 4%. Massey remains the largest entity operating in Gisborne accounting for 3% of the learner market, with Otago, Waikato, and Victoria making up the remaining 1%.

Wānanga

- Wānanga occupy a relatively large proportion of the local learner's market, comparatively to other regions; at 27%. TWWoA occupies the majority (98%) of the Wānanga learner's market with TWWoA occupying the rest.

Number of Learners (2023)

2,588

Regional Population (2023)

52,600

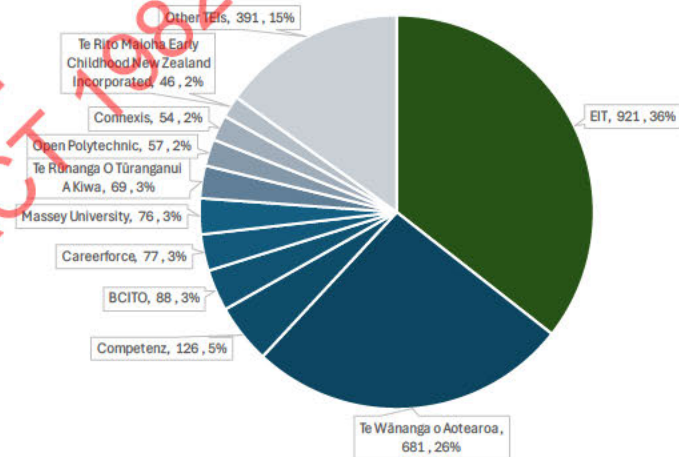
% of National Learners (2023)

0.9%

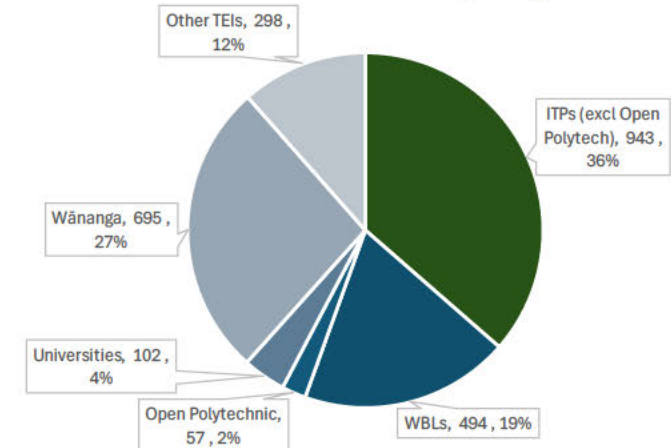
Learner % of Regional Pop.

4.9%

2023 Gisborne Competitive Market



2023 Gisborne Market by TEI Type



Hawke's Bay Region

The Hawke's Bay Region is New Zealand's 9th largest market for learners. 60 different TEO's compete within the region. The Hawke's Bay region is New Zealand's 9th largest region by population.

ITPs

- EIT is the primary ITP provider within the Hawke's Bay region, with a main campus located in Hastings. Additionally, Open Polytechnic, SIT, Otago Polytechnic, Toi Ohomai, Ara, Wintec, WelTec & Whitireia, and NMIT also have learners within the region. Excluding Open Polytechnic, this accounts for 44% of the Hawke's Bay learner's market.
- EIT accounts for 42% (2,484) of the Hawke's Bay learner's market.

Universities

- Universities take up a relatively small proportion of the local learner's market, comparatively to other regions; only 6%. Massey remains the largest entity operating in Hawke's Bay accounting for 5% of the Hawke's Bay learner's market, with Victoria, Waikato, Otago, Lincoln, and Canterbury making up the remaining 1%.

Wānanga

- TWOA and TWWoA account for 10% of the Hawke's Bay learner's market.

Number of Learners (2023)

5,844

Regional Population (2023)

184,800

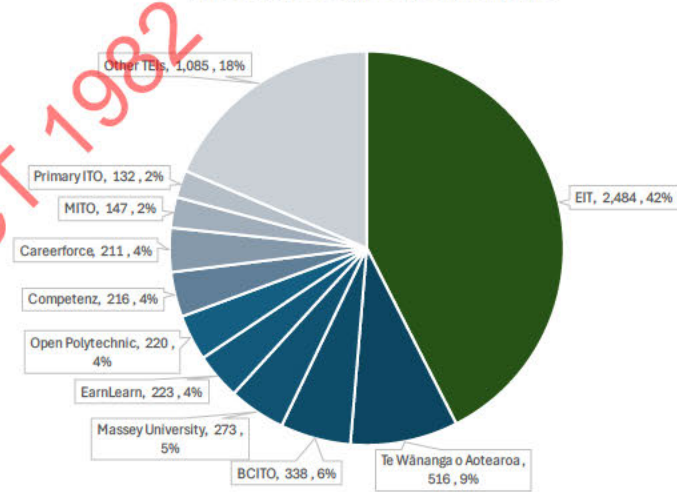
% of National Learners (2023)

2.0%

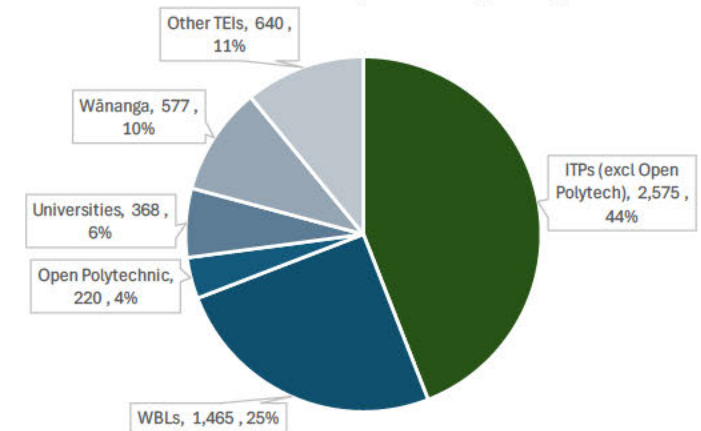
Learner % of Regional Pop.

3.2%

2023 Hawke's Bay Competitive Market



2023 Hawke's Bay Market by TEI Type



Taranaki Region

The Taranaki Region is New Zealand's 10th largest market for learners. 54 different TEO's compete within the region. The Taranaki region is New Zealand's 10th largest region by population.

ITPs

- WITT is the primary ITP provider within the Taranaki region, with a main campus located in New Plymouth. Additionally, Open Polytechnic, SIT, Otago Polytechnic, Wintec, NorthTec, Toi Ohomai, Ara, NMIT, and WelTec & Whitireia also have learners within the region. Excluding Open Polytechnic, this accounts for 35% of the Taranaki learner's market.
- WITT accounts for 32% (1,368) of the Taranaki learner's market.

Universities

- Massey is the largest entity operating in the Taranaki region accounting for 6% of the Taranaki learner's market, with Waikato, Otago, Victoria, and Canterbury making up the remaining 2%.

Wānanga

- TWOA and TWWoA account for 9% of the Taranaki learner's market.

Number of Learners (2023)

4,298

Regional Population (2023)

128,700

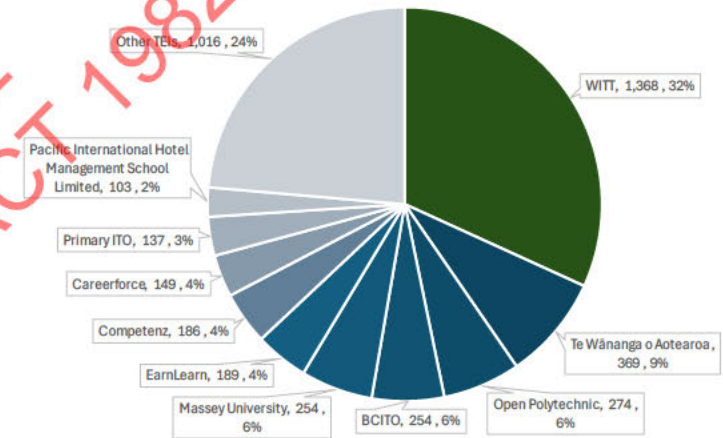
% of National Learners (2023)

1.5%

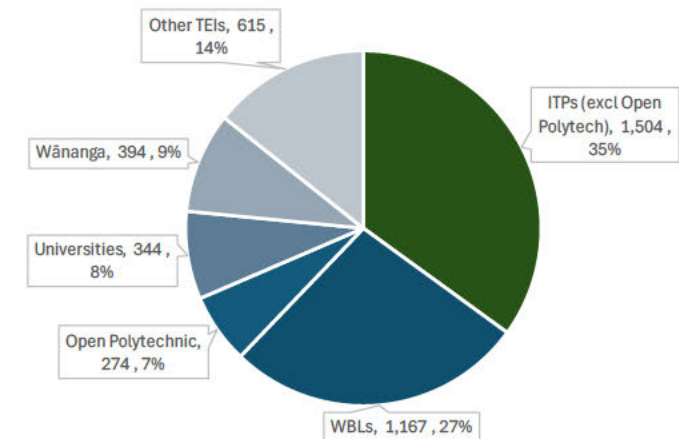
Learner % of Regional Pop.

3.3%

2023 Taranaki Competitive Market



2023 Taranaki Market by TEI Type



Manawatu – Whanganui Region

The Manawatu – Whanganui Region is New Zealand’s 7th largest market for learners. 75 different TEO’s compete within the region. The Manawatu – Whanganui region is New Zealand’s 6th largest region by population.

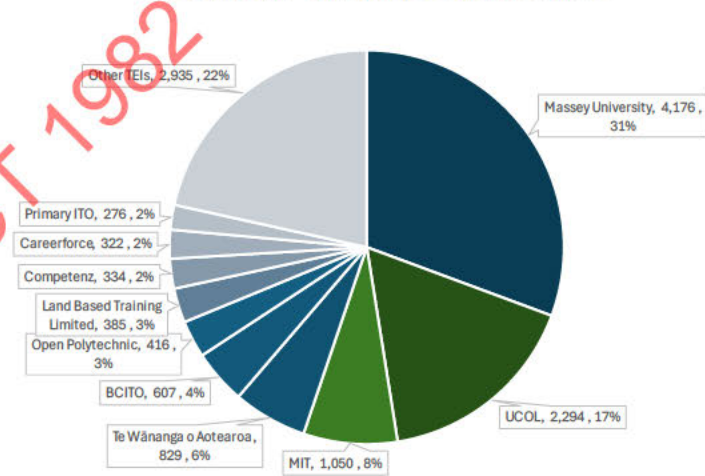
ITPs

- UCOL is the primary ITP provider within the Manawatu - Whanganui region, with a main campus located in Palmerston North. Additionally, MIT, Open Polytechnic, SIT, Otago Polytechnic, Toi Ohomai, Tai Poutini, WelTec & Whitireia, NMIT, Wintec, and WITT also have learners within the region. Excluding Open Polytechnic, this accounts for 26% of the Manawatu-Whanganui learner’s market.
- UCOL and MIT accounts for 25% (3,344) of the Manawatu-Whanganui learner’s market.

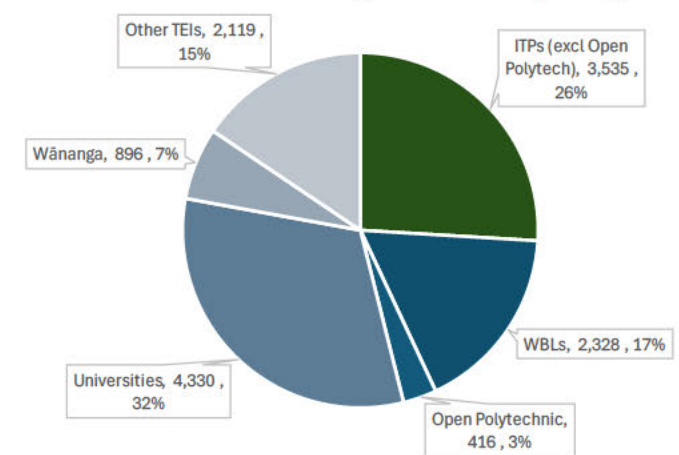
Universities

- Universities take up a relatively large proportion of the local learner’s market, comparatively to other regions; at 32%. Massey remains the largest entity operating in Manawatu-Whanganui region accounting for 31% of the learner market, with Waikato, Victoria, Otago, Lincoln, and Canterbury making up the remaining 1%.

2023 Manawatu-Whanganui Competitive Market



2023 Manawatu-Whanganui Market by TEI Type



Number of Learners (2023)

13,623

Regional Population (2023)

260,900

% of National Learners (2023)

4.7%

Learner % of Regional Pop.

5.2%

Wellington Region

The Wellington Region is New Zealand's 3rd largest market for learners. 77 different TEO's compete within the region. The Wellington region is New Zealand's 3rd largest region by population.

ITPs

- WelTec & Whitireia is the primary ITP provider within the Wellington region, with a main campus located in Porirua. Additionally, Open Polytechnic, UCOL, Otago Polytechnic, SIT, Toi Ohomai, Ara, NMIT, WITT, Wintec, Tai Poutini, NorthTec, and MIT also have learners within the region. Excluding Open Polytechnic, this accounts for 11% of the Wellington learner's market.
- WelTec & Whitireia accounts for 9% (3,167) of the Wellington learner's market.

Universities

- The Wellington Market is dominated by the University of Victoria, accounting for 41% of the Wellington learner market. Massey accounts for a further 9% of the local market. Smaller players such as Otago, Waikato, Lincoln, and Canterbury make up the remaining 2%.

Wānanga

- Te Wānanga o Raukawa (TWR), TWA and TWWoA account for 11% of the Wellington learner's market.

Number of Learners (2023)

36,338

Regional Population (2023)

550,500

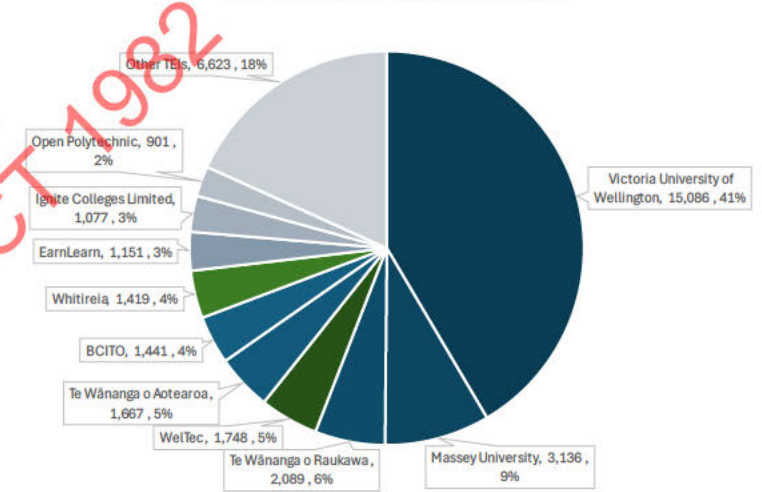
% of National Learners (2023)

12.6%

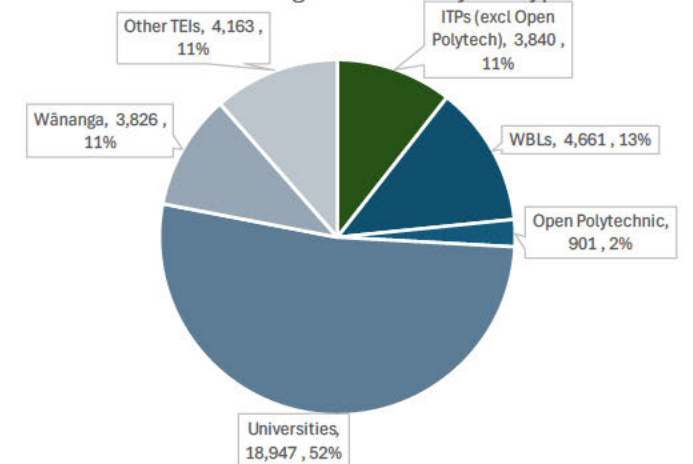
Learner % of Regional Pop.

6.6%

2023 Wellington Competitive Market



2023 Wellington Market by TEI Type



Tasman Region

The Tasman Region is New Zealand's 17th largest (and New Zealand's smallest) market for learners. 35 different TEO's compete within the region. The Tasman region is New Zealand's 12th largest region by population.

ITPs

- Open Polytechnic is the primary ITP provider within the Tasman region. NMIT has a campus in Richmond. Additionally, Open Polytechnic, SIT, Otago Polytechnic, Ara, and Toi Ohomai also have learners within the region. Excluding Open Polytechnic, this accounts for 11% of the Tasman learner's market.
- NMIT accounts for 6% (43) of the Tasman learner's market. Open Polytechnic have a larger market share here at 11%.

Universities

- Massey is the largest entity operating in the Tasman region accounting for 8% of the Tasman learner's market, with Otago, Victoria, Waikato, and Canterbury making up the remaining 3%.

WBLs

- Proportionally, there are a large number of WBL learners within the Tasman region. WBL's account for 44% of the local learner market, with Competenz, BCITO, Primary ITO, and Careerforce accounting for 36% between them.

Number of Learners (2023)

766

Regional Population (2023)

59,400

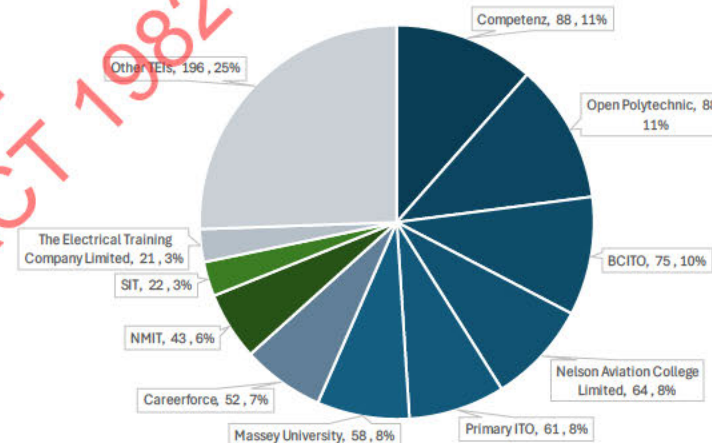
% of National Learners (2023)

0.3%

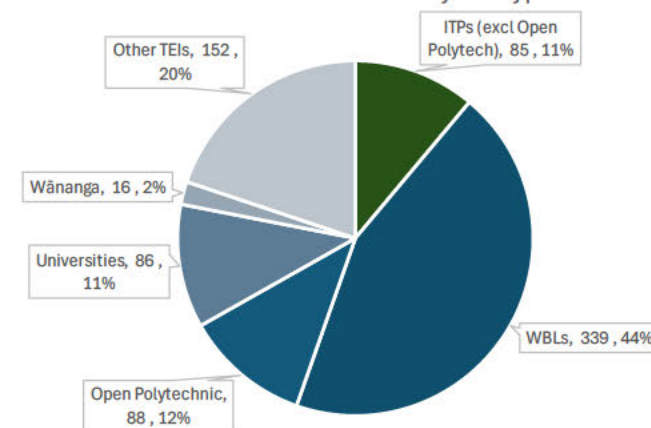
Learner % of Regional Pop.

1.3%

2023 Tasman Competitive Market



2023 Tasman Market by TEI Type



Nelson Region

The Nelson Region is New Zealand's 13th largest market for learners. 39 different TEO's compete within the region. The Nelson region is New Zealand's 13th largest region by population.

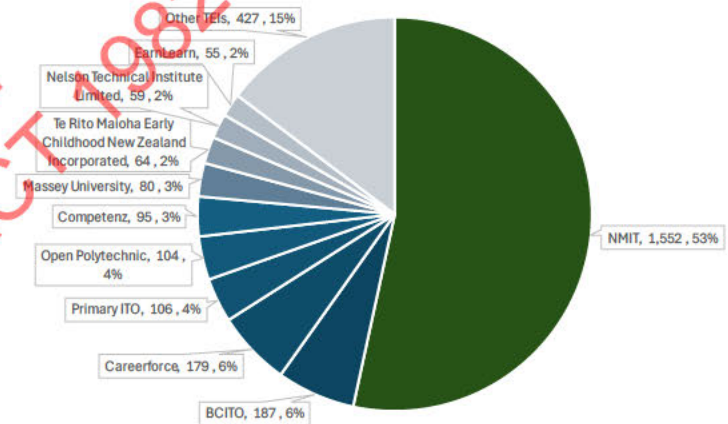
ITPs

- NMIT is the primary ITP provider within the Nelson region, with a main campus located in Nelson. Additionally, Open Polytechnic, SIT, Ara, Otago Polytechnic, Tai Poutini, and Toi Ohomai also have learners within the region. Excluding Open Polytechnic, this accounts for 55% of the Nelson learner's market.
- NMIT accounts for 53% (1,552) of the Nelson learner's market.

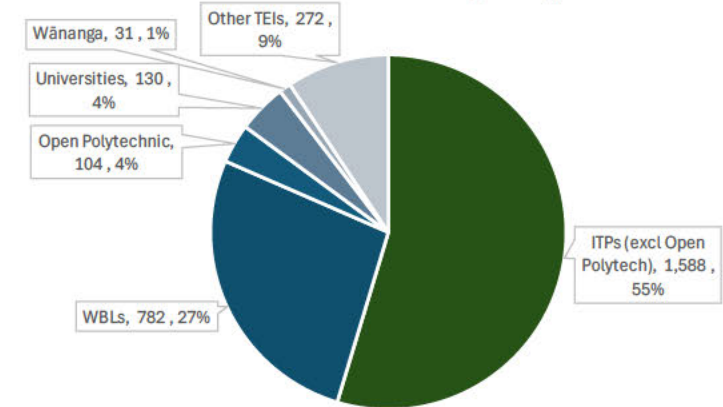
Universities

- Universities take up a relatively small proportion of the local learner's market, comparatively to other regions; only 4%. Massey remains the largest entity operating in the Nelson region accounting for 4% of the Nelson learner's market, with Otago, Canterbury, and Victoria making up the remaining 1%.

2023 Nelson Competitive Market



2023 Nelson Market by TEI Type



Number of Learners (2023)

2,906

Regional Population (2023)

55,600

% of National Learners (2023)

1.0%

Learner % of Regional Pop.

5.2%

Marlborough Region

The Marlborough Region is New Zealand's 15th largest market for learners. 35 different TEO's compete within the region. The Marlborough region is New Zealand's 15th largest region by population.

ITPs

- NMIT is the primary ITP provider within the Marlborough region, with a main campus located in Blenheim. Additionally, Open Polytechnic, SIT, Otago Polytechnic, Ara, Toi Ohomai, and Wintec also have learners within the region. Excluding Open Polytechnic, this accounts for 30% of the Marlborough learner's market.
- NMIT accounts for 26% (306) of the Marlborough learner's market.

Universities

- Universities take up a relatively small proportion of the local learner's market, comparatively to other regions; only 7%. Massey is the largest entity operating in Marlborough accounting for 5% of the Marlborough learner's market, with Otago, Victoria, and Lincoln making up the remaining 2%.

WBLs

- Proportionally, there are a large number of WBL learner's in the Marlborough region. WBL's account for 41% of the local learner market, with ServiceIQ and BCITO accounting for 19% between them.

Number of Learners (2023)

1,169

Regional Population (2023)

52,200

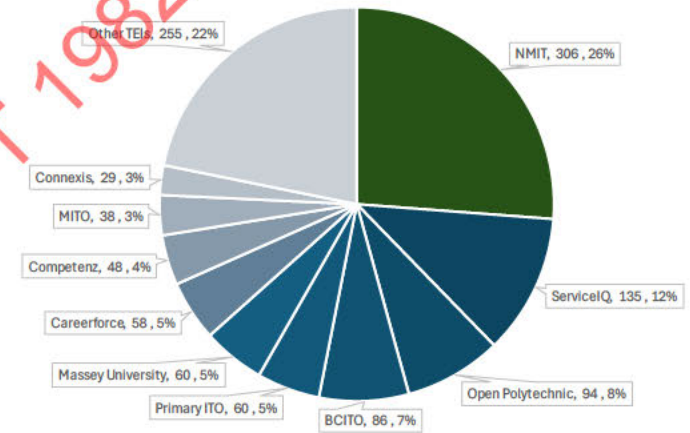
% of National Learners (2023)

0.4%

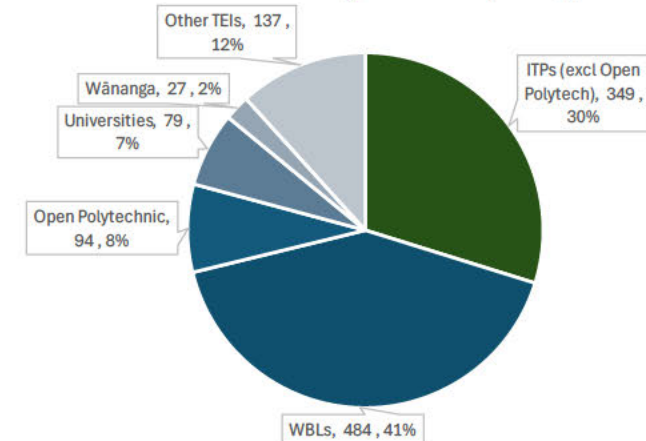
Learner % of Regional Pop.

2.2%

2023 Marlborough Competitive Market



2023 Marlborough Market by TEI Type



Canterbury Region

The Canterbury Region is New Zealand's second largest market for learners. 85 different TEO's compete within the region. The Canterbury region is New Zealand's second largest region by population.

ITPs

- Ara is the primary ITP provider within the Canterbury region, with a main campus located in Christchurch. Additionally, Open Polytechnic, SIT, Otago Polytechnic, Toi Ohomai, NMIT, WelTec & Whitireia, Wintec, Tai Poutini, UCOL, Northtec and WITT also have learners within the region. Excluding Open Polytechnic, this accounts for 18% of the Canterbury learner's market.
- Ara accounts for 16% (6,238) of the Canterbury learner's market.

Universities

- A large portion (approx. 50%) of the Canterbury learner's market is occupied by both the University of Canterbury and Lincoln University. Smaller players such as Otago, Massey, Victoria, and Waikato account for the remaining 3% of University learners.

Wānanga

- TWoA has a relatively small share of the Canterbury learner's market, at 3%.

Number of Learners (2023)

39,998

Regional Population (2023)

666,300

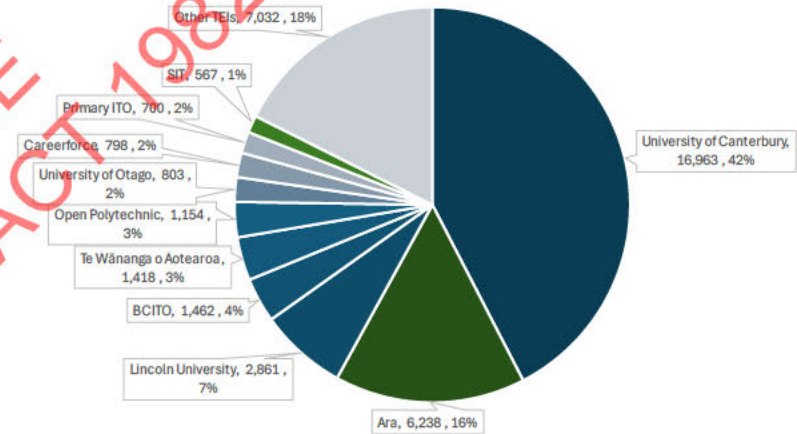
% of National Learners (2023)

13.8%

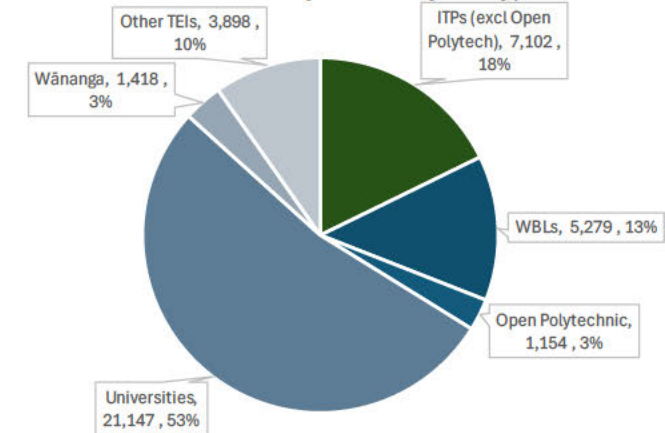
Learner % of Regional Pop.

6.0%

2023 Canterbury Competitive Market



2023 Canterbury Market by TEI Type



West Coast Region

The West Coast Region is New Zealand's 16th largest market for learners. 27 different TEO's compete within the region. The West Coast region is New Zealand's 16th largest (and New Zealand's smallest) region by population.

ITPs

- Tai Poutini Polytechnic is the primary ITP provider within the West Coast region, with a main campus located in Greymouth. Additionally, Open Polytechnic, SIT, Otago Polytechnic, Ara, Wintec, and NMIT also have learners within the region. Excluding Open Polytechnic, this accounts for 24% of the West Coast learner's market.
- Tai Poutini accounts for 20% (185) of the West Coast learner's market.

Universities

- Universities take up a relatively small proportion of the local learner market, comparatively to other regions; only 4%. Massey, Otago and Canterbury are the only universities with learners in the region.

WBLs

- Proportionally, there are a large number of WBL learner's within the West Coast region. WBL's account for 38% of the local learner market with BCITO, Careerforce, Competenz and MITO accounting for 23% between them.

Number of Learners (2023)

905

Regional Population (2023)

32,900

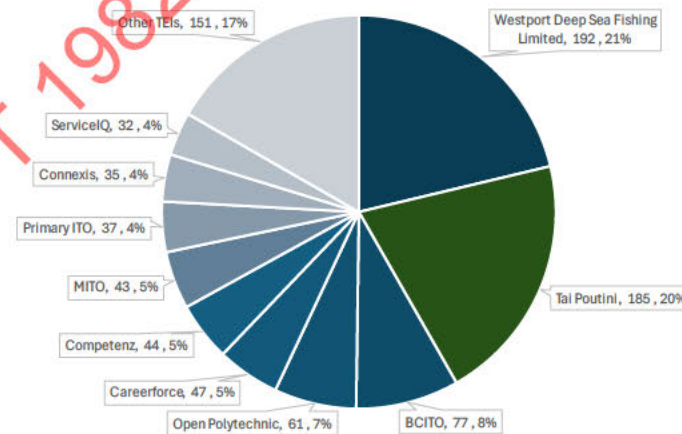
% of National Learners (2023)

0.3%

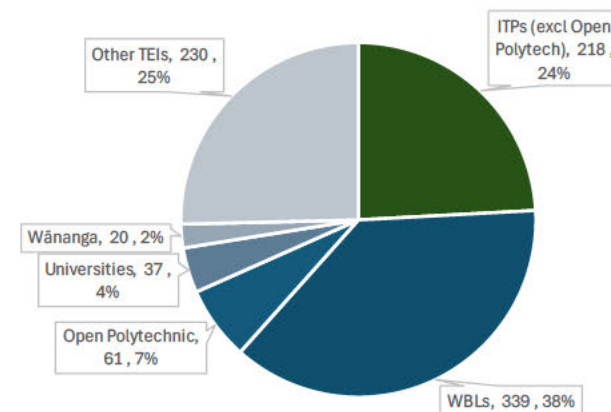
Learner % of Regional Pop.

2.8%

2023 West Coast Competitive Market



2023 West Coast Market by TEI Type



Otago Region

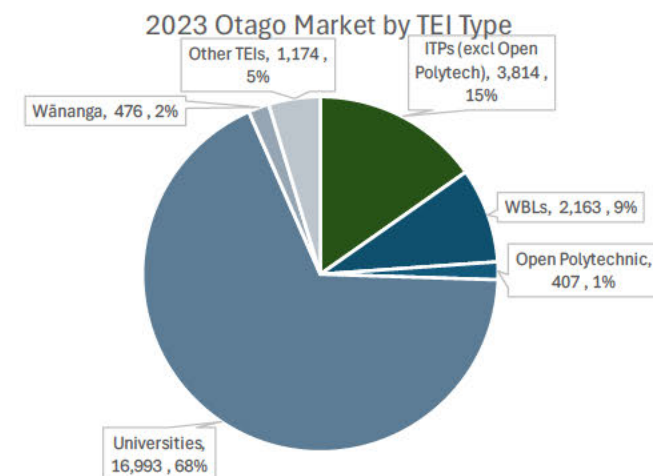
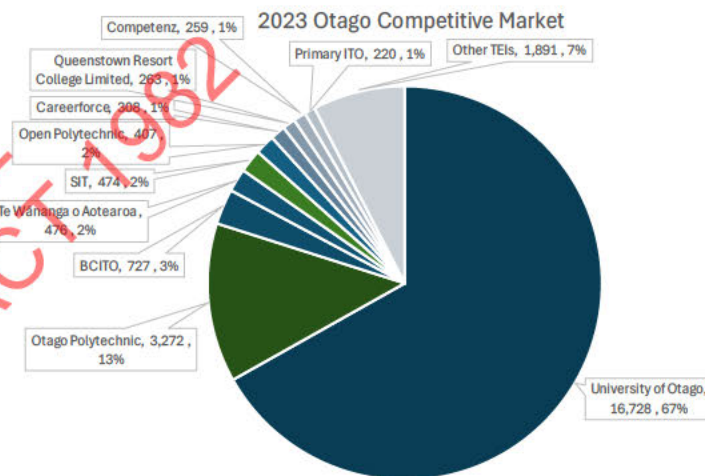
The Otago Region is New Zealand's 4th largest market for learners. 62 different TEO's compete within the region. The Otago region is New Zealand's 7th largest region by population.

ITPs

- Otago Polytechnic is the primary ITP provider within the Otago region, with a main campus located in Dunedin. Additionally, SIT, Open Polytechnic, Ara, Tai Poutini, Toi Ohomai, WelTec & Whitireia, NMIT, and Wintec also have learners within the region. Excluding Open Polytechnic, this accounts for 15% of the Otago learner's market.
- Otago Polytechnic accounts for 13% (3,272) of the Otago learner's market.

Universities

- The Otago Market is dominated by the University of Otago; accounting for 67% of the Otago learner market. Smaller players such as Massey, Victoria, Lincoln, Waikato, and Canterbury make up the remaining 1%.



Number of Learners (2023)

25,027

Regional Population (2023)

254,600

% of National Learners (2023)

8.7%

Learner % of Regional Pop.

9.8%

Southland Region

The Southland Region is New Zealand's 11th largest market for learners. 44 different TEO's compete within the region. The Southland region is New Zealand's 11th largest region by population.

ITPs

- SIT is the primary ITP provider within the Southland region, with a main campus located in Invercargill. Additionally, Open Polytechnic, Otago Polytechnic, NorthTec, Ara, Toi Ohomai, WelTec & Whitireia, Tai Poutini, and NMIT also have learners within the region. Excluding Open Polytechnic, this accounts for 51% of the Southland learner's market.
- SIT accounts for 48% (1,860) of the Southland learner's market.

Universities

- Universities take up a relatively small proportion of the local learner's market, comparatively to other regions; only 5%. Otago and Massey remains the largest entities operating in Southland accounting for 5% of the Southland learner's market, with Victoria, Lincoln, Waikato, and Canterbury making up the remaining <1%.

WBLs

- Proportionally, there are a large number of WBL learner's in the Southland region. WBL's account for 31% of the local learner market, with Primary ITO, BCITO and Competenz accounting for 19% between them.

Number of Learners (2023)

3,836

Regional Population (2023)

103,900

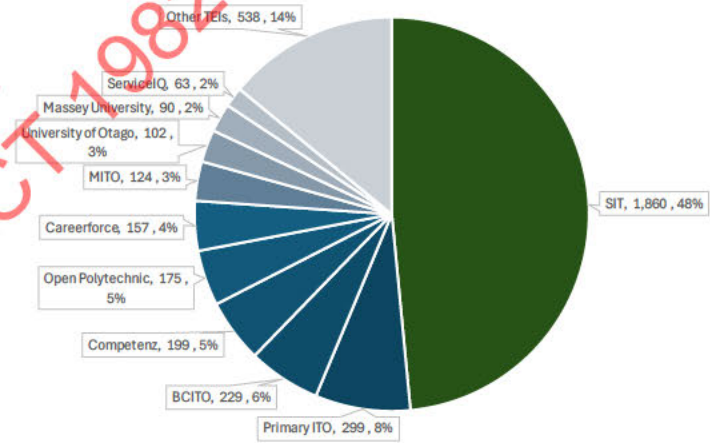
% of National Learners (2023)

1.3%

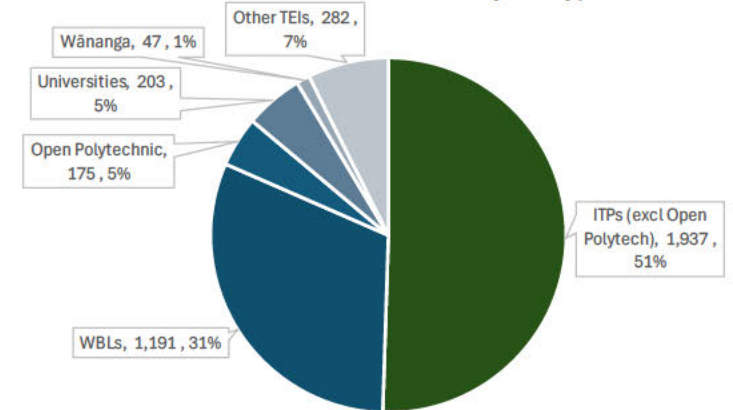
Learner % of Regional Pop.

3.7%

2023 Southland Competitive Market



2023 Southland Market by TEI Type



Rest of New Zealand

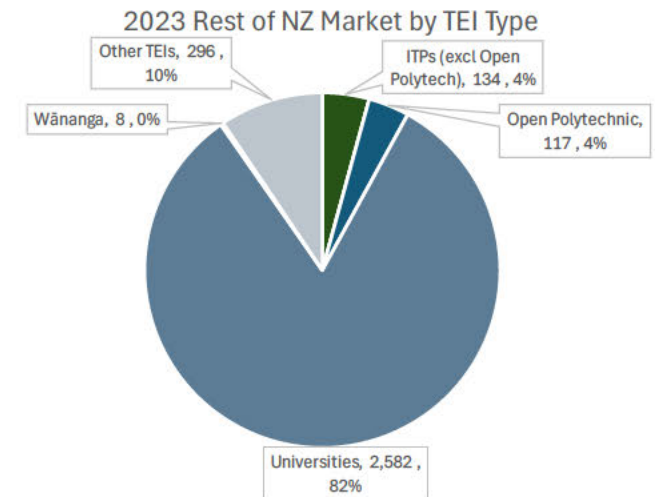
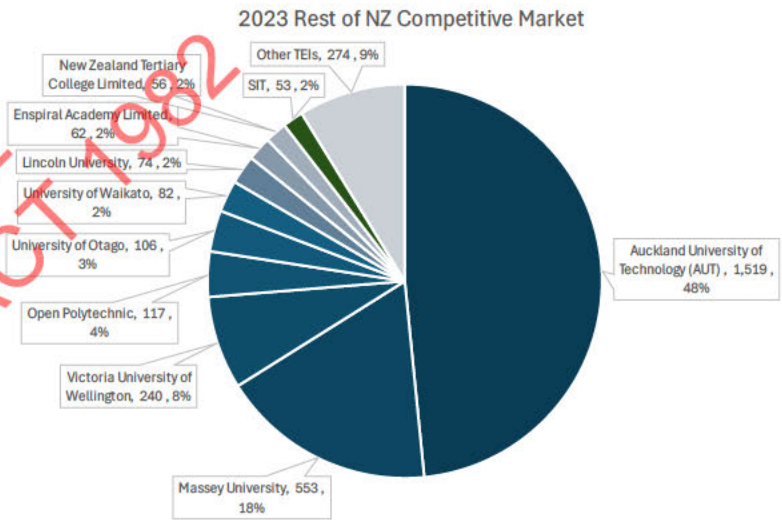
Learners not captured within a particular region are lumped into an Extramural region that encompasses all New Zealand. This grouping is the 12th largest market for learners in New Zealand and comprises of 37 competing TEOs.

ITPs

- Outside of Open Polytechnic, there is no one ITP that has a large market share. Smaller players such as Unitec, Toi Ohomai, Otago Polytechnic, NMIT, EIT, and WelTec & Whitireia make up 4% of the Rest of New Zealand learner's market.
- Open Polytechnic accounts for 4% (134) of the Rest of New Zealand learner's market.

Universities

- The Rest of New Zealand Market is dominated by AUT, Massey University, and Victoria University; accounting for 74% of the Rest of NZ learner market. Smaller players such as Otago, Waikato, Lincoln and Canterbury account for the remaining 8% of University learners.



Number of Learners (2023)

3,136

Regional Population (2023)

NA

% of National Learners (2023)

1.1%

Learner % of Regional Pop.

NA

Tēnā rawa atu koutou | Thank you all

RELEASED UNDER THE
OFFICIAL INFORMATION ACT 1982



Te Pūkenga



Te Pūkenga

RELEASED UNDER THE
OFFICIAL INFORMATION ACT 1982